# Beneficiary Support Toolkit for Trust Professionals

# Chapter 1 Resource

**Systems for Clear, Consistent, and Effective Communication**

Communicating consistently with a beneficiary and their family helps build a solid relationship with the family. It can also help limit calls and complaints that you receive from the beneficiary. The checklist below can help ensure your system for communicating supports positive relationships with beneficiaries.

We recognize that the system that each trust uses will differ based on the size of the trust, the number of beneficiaries and staff, and monetary resources available to the trust. We hope this checklist can help you make sure your system is promoting effective communication.

**Database Maintenance**

[ ]  We maintain one comprehensive database of our beneficiaries. This database can be sorted and updated, and it includes a place to add comments or notes.

[ ]  Beneficiary information and history is located and referenced in one place to avoid any confusion or poor data.

[ ]  We review our database regularly to ensure that our data is comprehensive and clear.

**Communications to/from Beneficiaries**

[ ]  Our system provides reminders to staff to connect with clients regularly and proactively (e.g., a monthly calendar reminder).

[ ]  Our system provides guidance for how quickly we must respond to beneficiary requests or complaints.

[ ]  We conduct spot-checks to ensure staff know how and when to communicate and are following this guidance consistently.

[ ]  We have a 1 or 2 step process for our beneficiaries and families to provide information, feedback, and documents to us.

[ ]  Our process is flexible for beneficiaries and families to use.

**Staff Training**

[ ]  We provide training to new staff on communications with beneficiaries.

[ ]  We provide annual training to maintain and update staff knowledge.

[ ]  We provide regular opportunities for staff to share challenges or identify needed updates to communication policies, procedures, the database, or to training.

[ ]  Training includes:

[ ]  Why it is important to be open, honest, and accountable to beneficiaries and families

[ ]  How and when to check beneficiary history before connecting with a beneficiary

[ ]  How and when to update the database after connecting with a beneficiary, including updates on communication preferences

[ ]  How and when to follow-up with a beneficiary after an initial meeting

[ ]  How and when to follow-up with a beneficiary after a check-in or site visit

[ ]  How and when to follow-up with a beneficiary after a disbursement request or complaint

[ ]  How and when to input other notes that need to be maintained via the database

**Share With Us**

Did any of these tips and resources spark a memory or story you want to share, or a resource or tool you need? [Complete this form to contact us and share your ideas](https://thearcus.surveymonkey.com/r/7F5N5DC)!

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